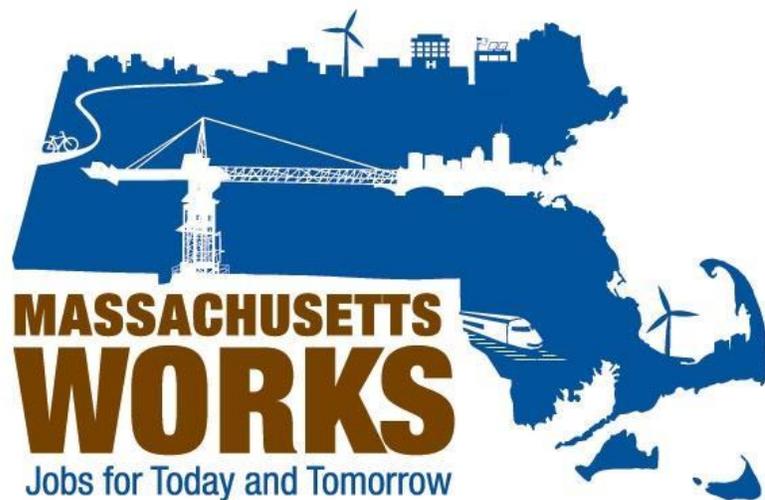


MASSWORKS INFRASTRUCTURE PROGRAM

2013 GRANT RECIPIENT HANDBOOK



**The MassWorks Infrastructure Program Grant Recipient Handbook is intended to provide guidance regarding the MassWorks grant administration process. The Executive Office of Housing and Economic Development reserves the right to request additional information or amend the processes described in the handbook.



Commonwealth of Massachusetts
**EXECUTIVE OFFICE OF
HOUSING & ECONOMIC DEVELOPMENT**
ONE ASHBURTON PLACE, ROOM 2101
BOSTON, MASSACHUSETTS 02108
www.mass.gov/eohed

DEVAL L. PATRICK
GOVERNOR

GREGORY BIALECKI
SECRETARY

TELEPHONE
(617) 788-3610

FACSIMILE
(617) 788-3605

Dear MassWorks Infrastructure Program Grant Recipient,

Congratulations on your MassWorks Infrastructure Program Grant. The Executive Office of Housing and Economic Development looks forward to working with you to help ensure a timely and successful completion of your public infrastructure project. This handbook is designed to provide guidance on many of the details related to the MassWorks Infrastructure Grant Program and the grant management software, Intelligrants. Enclosed is information related to EOHD's contracting and reporting requirements as well as other helpful tips to guide you through the process. Please make yourself familiar with the details provided as they will be the rules all grant recipients will be required to follow, these rules, in addition to the procedures outlined in your grant contract.

The MassWorks Infrastructure Grant Projects are monitored closely with the goal of completing each project both efficiently and effectively. MassWorks Infrastructure Program Grant Recipients that successfully complete their infrastructure projects both on time and on budget will be recognized by the Patrick Administration as partners in helping the State achieve its goal of spending the state's resources carefully and efficiently.

Should you have questions about the information included in this handbook or have a concern that is not addressed in the handbook, please do not hesitate to contact your MassWorks Project Manager.

We look forward to visiting your community and seeing the project soon!

Sincerely,

The MassWorks Infrastructure Program Team

Table of Contents

1. Utilizing Intelligrants for Grant Management.....	6
2. Contracts.....	6
Eligible MassWorks Infrastructure Program Grant Recipients.....	6
Contract Execution Timeline	7
Contract Process: Municipal Contract Form	7
Public Procurement	11
Fiscal Year Requirements	12
Project Delays.....	12
Contract Amendments	12
3. Invoicing.....	14
Monthly Invoicing.....	14
Eligible Costs.....	15
Reimbursement Guidance.....	15
Invoice Dates vs. Dates of Service	15
Electronically Submitted Invoice Requirements	16
Retainage Policy	20
4. Project Closeout.....	20
Proof of Project Completion.....	20
Fiscal Year Spending	22
5. Reporting Requirements.....	22
Progress Reports.....	22
6. Additional Information.....	25
Monthly Project Manager Calls	25
Events and Press.....	25
MassWorks Contact Information	26
Mailing Address	26

1. Utilizing Intelligrants for Grant Management

We are pleased to announce that starting with the 2013 awards, a large majority of the MassWorks grant administrative process will be conducted utilizing Intelligrants, the same web-based application used to apply for MassWorks grants. This switch will include an online process for contracting, invoicing, reporting, and project closeout which will allow for advancements in efficiency and transparency. Please use the instructions incorporated throughout this handbook for assistance using the Intelligrants system. Intelligrants is an internet-based service that can take varying amounts of time to respond to user interface based off on internet connection speed.

Intelligrants user capabilities are determined by which “status” the project is in. Before applications are submitted by public entities the application is in the “Application in process” status. When applications are submitted for consideration they are in an “Application Submitted/Initial Review” status. When they are approved their status becomes “Application Award Granted” and so on. Please take note of which status your application it is in as it can limit grant recipient capabilities. Status requirements for certain actions regarding your application are included in the instructions below.

Please note: references within the document are dynamic and can be used to jump through the document by clicking the page number or section referenced, including the Table of Contents.

2. Contracts

Contracts awarded under the MassWorks Infrastructure Program (MassWorks) are administered and executed by the Executive Office of Housing and Economic Development (EOHED). Each project will be assigned to a dedicated Project Manager who will serve as your point of contact throughout the life of your grant contract and reporting requirements. Entering the most accurate and up to date information into Intelligrants allows for the contract between the MassWorks Grant Recipient and EOHED to be executed in a timely manner. The following is a breakdown of important components to the contract process.

Eligible MassWorks Infrastructure Program Grant Recipients

MassWorks contracts are executed between EOHED and a municipality or other public entity. Grant contracts and reimbursements cannot be made directly between the state and for-profit private parties.

Contract Execution Timeline

When possible, contracts should be executed after construction bids have been received. This process will allow the most accurate and up to date information to be included in the grant contract. MassWorks Grant Recipients should consult with their finance rules and regulations to determine if projects may be put out to bid prior to receiving a contract from EOHED. It is recommended that the bids include language indicating that award of a construction contract is contingent upon contract execution with EOHED. Please be advised that receipt of an award letter or this handbook does not act as a contract with the State for the grant award and, unless arranged otherwise, no costs associated with the MassWorks Grant should be incurred until a contract has been executed.

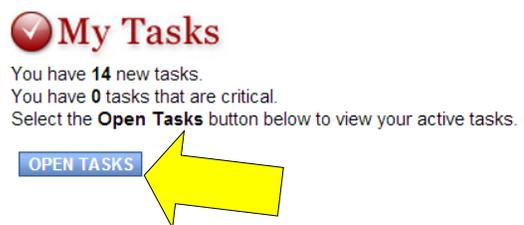
If a contract is executed prior to construction bids being finalized (i.e. MassWorks funds being used to fund design), the MassWorks Grant Recipient must include best estimates in the contract. After consultation with and approval by the Project Manager, the MassWorks contract will be amended to update the project cost, scope of work, milestones, and drawdown schedule, if the bid results alter any of those details.

Contract Process: Municipal Contract Form

The MassWorks Grant Recipient is responsible for accurately filing out the Municipal Contract Form which includes the project scope of work, milestones, and drawdown schedule. All contracts must contain this important information. To access the Municipal Contract Form, please follow these steps:

- a. Log in as grant administrator with the same credentials used to submit applications for grants: http://madhcd.intelligrants.com/login2.aspx?APPTHEME=MADHCD_EOH
NOTE: The Municipal Contract Form may only be edited when your application status is “Application Award Granted”.

1. There are two ways of accessing a list of applications. The first is by logging on and clicking the “Open Tasks” then by selecting an application’s name. The application status is also visible on this page.



My Tasks

Export Results to Sort by:

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	MassWorks Infrastructure Program - 2013	MADHCD EOH Testing Org	MWIP-2013-MADHCD E-00013	Application in Process	6/17/2013	
	MassWorks Infrastructure Program - 2013	MADHCD EOH Testing Org	MWIP-2013-MADHCD E-00014	Application in Process	6/17/2013	
	MassWorks Infrastructure Program - 2013	MADHCD EOH Testing Org	MWIP-2013-MADHCD E-00015	Application in Process	6/17/2013	
	MassWorks Infrastructure Program - 2013	MADHCD EOH Testing Org	MWIP-2013-MADHCD E-00016	Amendment in Process	7/12/2013	
	MassWorks Infrastructure Program -	MADHCD EOH Testing	MWIP-2013-MADHCD E-	Application in Process	7/1/2013	

- Alternatively, there are four tabs across the top of the screen, click “MassWorks Applications”

Executive Office of Housing and Economic Development

Home MassWorks Applications Invoices Progress Reports

Reports

Welcome System Administrator [Change Picture](#)

Instructions:
Select the **SHOW HELP** butto
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded gra

- Search for your active, awarded grant. The fourth field down reads “Status”. From that field’s drop down box select “MassWorks Infrastructure Program: Application Awarded” then click “Search”. NOTE: The other four fields are left blank. The applications awarded for your town will populate. Click on the application number which will read similar to: MWIP-2013-YOURTOWN-0000.

[Back](#)

MassWorks Applications

Use the search functionality below to find a specific MassWorks Applications.

Search MassWorks Applications

MassWorks Applications Types

MassWorks Applications Name

Person

Status

Year

Export Results to Sort by:

Number of Results 1

Document Type	Organization	Name
MassWorks Infrastructure Program - 2013	Berlin	MWIP-2013-Berlin-00025

- b. Find the Municipal Contract Form. After clicking selecting your active, awarded application under “View, Edit, and Complete Forms”. This will take you to the grant’s homepage. Then click the blue button that reads “View Forms”.

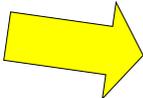
View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

c. After clicking “View Forms” the list of forms used to fill out the MassWorks application will appear. Now visible beneath those pages is a field titled “Contract”, beneath that click on “Municipal Contract Form”.

d. Fill out the Municipal Contract Form. After clicking “Municipal Contract Form” the following page will appear. Fill out the Municipal Contract Form as required then click save. Once the form is saved it will be reviewed by EOHEd for completeness. If satisfactory the grant will be pushed to the “Project Management Draft Contract in Progress” status.

Status	Page Name
	Applicant Information
	Project Type and Description
	Public Infrastructure Project
	Planning Ahead for Growth
	Project Map
	Budget and Sources
	Project Schedule and Milestones
	Readiness Checklist
	Development Project
	Certification of Public Entity Authorization
	EOH Only Contract
Project Management	
	Project Summary Report
Contract	
	Municipal Contract Form



Executive Office of Housing and Economic Development

Home
MassWorks Applications
Invoices
Progress Reports

Training Materials |
 Organization(s) |
 Profile |
 Logout

SAVE CHECK GLOBAL ERRORS

[Back](#)

Document Information: [MWIP-2013-Berlin-00025](#)

[Details](#)

You are here: > [MassWorks Infrastructure Program - 2013 Menu](#) > [Forms Menu](#)

MUNICIPAL CONTRACT FORM

Public Entity: *

Economic Development Project Name: *

Project Contact Name: *

Email: *

Phone: *

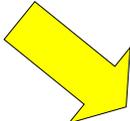
Municipal Address: *

Economic Development Project Address: *

EOHED Project Manager:

Total Contract Amount: *

Request Contract End Date: *



After the Municipal Contract Form is received, EOHEd will work to develop the remaining contract documents, also using Intelligrants. Once the MassWorks Grant Recipient is notified that the document is complete they may download a complete version of contract. The printed contract should be reviewed by the public entity, signed, and *mailed* back to EOHEd to the attention of your Project Manager. This is the only part of the grant process that cannot be completed online as a signed contract is required by State Comptroller regulations. If the public entity would like a contract with original signatures for their records, two signed copies of the contract should be submitted to EOHEd for signature.

Once the contract is received it will be reviewed by MassWorks staff and then will be submitted for final signature. The contract is not effective until signed by authorized EOHEd personnel. The Project Manager will then upload the fully executed contract into Intelligrants where it can be viewed and printed by the Grant Recipient. The EOHEd Project Manager will notify Grant Recipients when a contract is fully executed and when the grant-funded project may commence. In the event that terms of a contract differ from the instructions in this handbook, the contract will supersede the handbook.

Public Procurement

The MassWorks Grant Recipient is responsible for ensuring the grant-funded project is bid in accordance with all state procurement requirements under Massachusetts General Laws c.30B, c.30 §39M, c. 149, and c. 7, to the extent applicable. Please see: <http://www.mass.gov/ig/igch30b.htm> for additional information on Massachusetts procurement requirements.

MassWorks Grant Recipients should make note of Executive Office of Administration and Finance Administrative Bulletin #18, regarding the labor participation goals for women and minorities on state construction projects and state-assisted construction projects. The current goals are 10.4% Minority Business Enterprise (MBE) and Women Business Enterprise (WBE) for construction and 17.9% MBE/WBE for design. These participation objectives are goals and are not quotas or set-asides, and are neither floors nor ceilings.

Also please be advised that the Construction Reform Law (Chapter 193 of the Acts of 2004) includes a new municipal affirmative marketing program. This requirement is **not applicable** to the procurement of **site work (horizontal construction)** subject to MGL c.30 sec.39M or MGL c.30B. However, municipalities must incorporate MBE/WBE goals into both their design and construction procurement for municipal contracts for the construction, reconstruction, alteration, remodeling, repair or demolition of any public building or public work by any city or town that includes funding provided by the Commonwealth, in whole or in part.

Fiscal Year Requirements

The state fiscal year runs from July 1st to June 30th. Multi-year grants are required to obligate funds by June 30th for funds allocated in that fiscal year by the contract drawdown schedule and submit all invoices by August 5th. Please note that fiscal year reimbursements are reviewed based on dates of service. Any work completed prior to June 30th is work in the previous fiscal year, regardless of the invoice date, and will not be accepted for payment after August 5th. Please see Invoicing ([Section 3](#)) for additional clarification.

Project Delays

If the project encounters delays, the Grant Recipient should inform the assigned EOHEP Project Manager as soon as delays are suspected or realized. All types of delays, including but not limited to those involving bid protests, utility relocation, weather, or permitting should be reported immediately. If a contract amendment is needed as a result of such delays, the Grant Recipient should submit a completed copy of the Contract Amendment Request Form via Intelligrants.

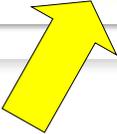
Contract Amendments

Grant Recipients should notify the assigned Project Manager of any of situation that would require a contract amendment, including potential or realized project delays, cost overruns, or change in scope. The Project Manager will work with the Grant Recipient to determine if a contract amendment is required or feasible.

Contract Amendments should always be initiated by the grant recipient using Intelligrants. To initiate a contract amendment search for active grants as done above under the [Contracting Process: Municipal Contract Form](#).

- a. The grant for which an amendment is sought must be in the ‘Active in Project Management’ status as seen below. After recognizing this status, click on “View Forms” from the View, Edit, and Complete Forms immediately below the search results.

Info	Document Type	Organization	Role	Current Status
	MassWorks Infrastructure Program - 2013	MADHCD EOH Testing Org	Grant Administrator	Active in Project Management



View, Edit and Complete Forms

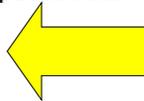
Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)



- b. After clicking “View Status Options, the following screen will appear. Click on “Apply Status”

MassWorks Infrastructure Program -

Select a button below to execute the appropriate status push.

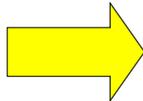
Document Information: [MWIP-2013-MADHCD E-00018](#)

 [Details](#)

Possible Statuses

AMENDMENT IN PROCESS

[APPLY STATUS](#)



- c. Upon clicking “Apply Status” you will be directed back to the grant homepage from which you should select the “View Forms” option from View, Edit, and Complete Forms. Please note the grant’s status has changed from “Active in Project Management” to “Amendment in Process”

Info	Document Type	Organization	Role	Current Status
MassWorks Infrastructure Program - 2013		MADHCD EOH Testing Org	Grant Administrator	Amendment in Process

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.



- d. Upon clicking the “View Forms” button the list of forms applicable to this grants status will appear. Among the forms will be those pertaining to the application, project management, review, contract, and then you will see “Contract Amendment Request”



- e. Upon clicking “Contract Amendment Request” the form will appear. Fill out the form as completely as possible. Be sure to click “Save” before advancing.
- f.
- g. Once saved, enter the “Change the Status” menu and click Amendment Submitted “Apply Status”



3. Invoicing

In order to expediently reimburse MassWorks Grant Recipients, it is important that municipalities or public entities abide by our invoicing guidelines. MassWorks invoices must be submitted electronically in an orderly and timely manner via Intelligrants. If the most recent, required progress report is not submitted a grant recipient will not be able to submit an invoice. For more information on such a circumstance see [Section 5](#).

Monthly Invoicing

Invoices are to be submitted on a monthly basis via Intelligrants, no later than the 15th of each month for work completed or items purchased during the month prior.

Eligible Costs

MassWorks grants can only be used to pay for work completed and purchase orders placed. Invoices must reflect work and/or materials needed to accomplish the items listed in the scope of work in the MassWorks contract. Costs may be flagged as ineligible and not reimbursed such as: Costs relating to work outside of the contract scope and costs associated with standard municipal staff responsibilities or grant administration.

Reimbursement Guidance

Contractors, developers, consultants and other private entities will not be directly reimbursed. It is the responsibility of the Grant Recipient to use the grant funds to pay these parties for work completed or purchase orders placed.

Correctly submitted, monthly invoices will be reimbursed by EOHED as soon as possible, but not later than 45 days from the date the invoice was received, including all proper back-up documentation, by the Project Manager. While it is the preference of the Commonwealth to make payments on a reimbursement basis, if this presents a hardship to the Grant Recipient, payment may be requested of EOHED prior to disbursement of funds.

In instances where Grant Recipients request payment prior to funds being disbursed by the grantee, documentation of payment by the grantee to its contractors must be submitted to the EOHED Project Manager within 60 days of receipt of funds from EOHED. Appropriate forms of verification of payment are copies of issued checks, or ledger statements from the grantees accounting system demonstrating payment, including payment numbers, amounts, vendor paid, and date the check/EFT was processed.

Delayed invoicing is highly discouraged. Please work with your contractors at the start of the project to notify them of the invoicing policy and associated expectations. This will ensure that the MassWorks Grant Recipient and contractors are reimbursed in a timely fashion.

Invoice Dates vs. Dates of Service

Invoices are reimbursed based on dates of service, not invoice billing dates. Dates of service (including start and end dates) must be clearly shown on all invoices submitted for payment. If this information is not provided, MassWorks will not release payment.

Design and engineering invoices must also contain defined dates of services. Please work with your consultant to include start and end dates on all invoices. This will ensure a timely review process.

Electronically Submitted Invoice Requirements

All requests for reimbursements must be completed using Intelligrants. Please utilize the instructions below in doing so.

- a. As done for other steps through the grant process search and navigate to the grant's homepage for which an invoice submission is sought. Once on the grant homepage click on "View Related Items" under the Examine Related Items heading.

Info	Document Type	Organization	Role	Current Status
	MassWorks Infrastructure Program - 2013	MADHCD EOH Testing Org	Grant Administrator	Active in Project Management

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request

[VIEW STATUS OPTIONS](#)

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document

[VIEW MANAGEMENT TOOLS](#)

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

[VIEW RELATED ITEMS](#)

- b. After clicking "View Related Items" click on "Initiate a MassWorks Invoice 2013"

Document Type	Name
MassWorks Invoice	Initiate a/an MassWorks Invoice 2013

- c. After clicking "Initiate a MassWorks Invoice 2013" you will notice that the status of the grant is now "Invoice in

Process”. This means that the invoice forms are ready for data and can be found by clicking “View Forms”.

Info	Document Type	Organization	Role	Current Status
	MassWorks Invoice	MADHCD EOH Testing Org	Grant Administrator	Invoice in Process

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

- d. Upon clicking “View Forms” request for payment coversheet will appear. Fill this out as completely as possible to aid a quick invoicing and reimbursement process. Certain fields are required, but all should be utilized. Make sure to click save before proceeding. Attach back up documentation at the bottom of the page.

[SAVE](#) [PRINT VERSION](#) [ADD NOTE](#)

 **Page Error(s)**

- 'Person preparing request' is a required field.
- 'Have scheduled milestones passed since the last request for payment?' is required.
- Full Name is a required field.
- Date is a required field.

[Back](#)

Document Information: [INV-2013-MADHCD EOH-00095](#)
 Parent Information: [MWIP-2013-MADHCD E-00019](#)
[Details](#)

You are here: > [MassWorks Invoice Menu](#) > [Forms Menu](#)

MASSWORKS INFRASTRUCTURE PROGRAM REQUEST FOR PAYMENT COVER SHEET

This request for payment cover sheet should be filled out and submitted with the invoices for which you are requesting reimbursement. Request for reimbursement will not be processed without the request for payment cover sheet.

To be completed by the Public Entity:

Name of Public Entity: MADHCD EOH Testing Org
 Person preparing request: *

- e. When ready to submit an invoice navigate back to the grant homepage and click “Change the Status” from the Change the Status option.

Info	Document Type	Organization	Role	Current Status
	MassWorks Invoice	MADHCD EOH Testing Org	Grant Administrator	Invoice in Process

View, Edit and Complete Forms

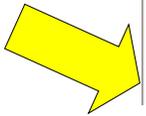
Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)



- f. After clicking “View Status Options” the following two options will appear. If confident that your submission is complete and accurate, click “Apply Status” under *Invoice Submitted*. By clicking this status the grant recipient has successfully submitted an invoice and EOHED will then be notified that the invoice is pending for review and approval.

MassWorks Invoice Menu - Status Options

Select a button below to execute the appropriate status push.

Document Information: [INV-2013-MADHCD EOH-00095](#)

Parent Information: [MWIP-2013-MADHCD E-00019](#)

 [Details](#)

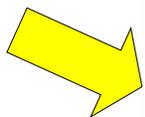
Possible Statuses

INVOICE SUBMITTED

[APPLY STATUS](#)

INVOICE CANCELLED

[APPLY STATUS](#)



- g. To monitor progress over the life of the grant, grant applications should use the EOH Invoice Form as seen below. This form will populate with data as EOHED processes invoices, such as amount requested by the grant recipient vs amount reimbursed, service to, service from, appropriation charged against, approval date, etc.

MMARS EOH INVOICE

Invoice Number

Scope Component	Amount Requested	Amount Reimbursed This Invoice
Study Phase Funding	\$0	
Design & Engineering Funding	\$0	
Construction Funding	\$0	
Other (i.e. legal, permits etc)	\$0	
Total of Columns	\$0	\$0

Budget Fiscal Year	Internal MMARS Doc ID	Accounting Line Number	Payment Amount	MMARS Submission Date	Service From	Service To	Appropriation	Contactor Vendor Code	Approved in MMARS

- h. To view the status of invoices grant recipients should log on, click the third tab labeled “invoices”, keep the search criteria as seen below, and then click search. These results will yield a list of invoices related to the grant and their status.

Executive Office of Housing and Economic Development

Home | MassWorks Applications | **Invoices** | Progress Reports

Training Materials | Organization(s) | Profile | Logout

SHOW HELP

Back

Invoices

Use the search functionality below to find a specific Invoice.

Search Invoices

Invoice Types:

Invoice Name:

Person:

Status:

Year:

Export Results to: Sort by:

Number of Results 4

Document Type	Organization	Name	Current Status	Year
MassWorks Invoice	MADHCD EOH Testing Org	INV-2013-MADHCD EOH-00078	Invoice Paid	2013
MassWorks Invoice	MADHCD EOH Testing Org	INV-2013-MADHCD EOH-00094	Invoice Cancelled	2013
MassWorks Invoice	MADHCD EOH Testing Org	INV-2013-MADHCD EOH-00095	Invoice in Process	2013
MassWorks Invoice	MADHCD EOH Testing Org	INV-2013-MADHCD EOH-00096	Invoice in Process	2013

1

Retainage Policy

MassWorks Grant Recipients will be reimbursed for 100% of the invoices submitted each month until 95% of the total project cost is paid. The remaining 5% will be withheld until the Grant Recipient adequately demonstrates that the project has been fully completed. MassWorks will release the 5% retainage as soon as the Project Manager is satisfied that the project has been completed consistent with the terms of the MassWorks contract. Grant Recipients are responsible for managing any retainage withheld from their contractor(s) in accordance with state and municipal laws.

4. Project Closeout

Proof of Project Completion

Proof of project completion can be demonstrated using the Project Closeout Certification Form. Grant Recipients are encouraged to provide photos of the completed project. Both the closeout form and the photos are required to be uploaded via Intelligrants. When ready a Project Manager is will initiate the project closeout process. Before a project can be closed out there must be a request for payment which designates that this will be the final payment request and that no further funds shall be requested. Once the invoice is processed the project closeout option will be processed request for payment in “Invoice paid” status.

- a. Once the Project Manager has initiated the closeout process the projects status will be “Grant Administrator Contract Closeout” at which point you should click on “Examine Related Items”

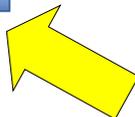
Info	Document Type	Organization	Role	Current Status
	MassWorks Infrastructure Program - 2013	MADHCD EOH Testing Org	Grant Administrator	Grant Administrator Contract Closeout



View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS



- b. After clicking “View, Edit and Complete Forms”
Click on “Contract Closeout”

Project Management

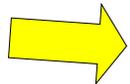
-  [Project Summary Report](#)

Contract

-  [Municipal Contract Form](#)

Closeout

-  [Contract Closeout](#)



- c. After clicking “Contract Closeout” the contract closeout form will pop up. Fill it out completely and then click “Save”.

[SAVE](#) [CHECK GLOBAL ERRORS](#)

[Back](#)

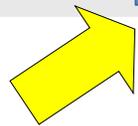
Document Information: [MWIP-2013-MADHCD E-00019](#)

[Details](#)

You are here: > [MassWorks Infrastructure Program - 2013 Menu](#) > [Forms Menu](#)

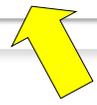
CONTRACT CLOSEOUT

Total Grant Award: \$50,000.00
 Amount Reimbursed to Date: \$0.00
 Final Invoice Amount: \$0.00
 Is this project complete?
 Project Final Balance: \$0



- d. After clicking that, from the grant homepage click on “Change the Status”, note the current status is now

Info	Document Type	Organization	Role	Current Status
	MassWorks Infrastructure Program - 2013	MADHCD EOH Testing Org	Grant Administrator	Grant Administrator Contract Closeout



 **View, Edit and Complete Forms**

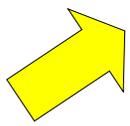
Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

 **Change the Status**

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)

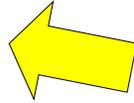


- e. After clicking “Change the Status” click on “Closeout Material Submitted” and your closeout documents will be submitted to the Project Manager.

Possible Statuses

CLOSEOUT MATERIAL SUBMITTED

APPLY STATUS



Fiscal Year Spending

EOHED will not pay invoices submitted after August 5th for work completed in the prior fiscal year. In order to avoid forfeiting grant funds, Grant Recipients must be diligent in submitting invoices in a timely fashion and in cases where amendments are necessary, it the responsibility of the Grant Recipient to complete the amendment request process as previously outlined on page12.

5. Reporting Requirements

EOHED is required by state law to collect and report data related to MassWorks awards. All Grant Recipients that receive a MassWorks award are required to submit progress reports.

Progress Reports

Progress reports aim to collect information related to the project status. It is important that the Grant Recipient use such reports to update the Project Manager of any project delays and any changes to the project. Grant Recipients are required to submit timely and accurate reports via Intelligrants. A public entity will not be able to submit a request for reimbursement until the most recent quarterly report is submitted.



Page Error(s)

Your previous quarter report is not complete, please complete that before you submit invoices.

- a. To initiate progress report ensure that there are no outstanding invoices and click on ‘Examine Related Items’

Info	Document Type	Organization	Role	Current Status
	MassWorks Infrastructure Program - 2013	MADHCD EOH Testing Org	Grant Administrator	Active in Project Management

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request

[VIEW STATUS OPTIONS](#)

Access Management Tools

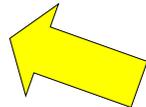
Select the **View Management Tools** button below to perform actions such as adding people to this document

[VIEW MANAGEMENT TOOLS](#)

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

[VIEW RELATED ITEMS](#)



- b. After clicking on “Examine Related Items” click on “Initiate a quarterly report”

Document Type	Name
MassWorks Invoice	Initiate a/an MassWorks Invoice 2013
MassWorks Quarterly Report	Initiate a/an MassWorks Quarterly Report 2013 - Quarter 1



- c. Notice that when you return to what seems to be the same menu, you are actually have the same menu options, but are in a new document labelled “MassWorks Quarterly Report” as opposed to the projects overall project.

Info	Document Type	Organization	Role	Current Status
	MassWorks Quarterly Report	MADHCD EOH Testing Org	Grant Administrator	Quarterly Report In Process

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

- d. Click on “View Forms” then click on “MassWorks Infrastructure Program Quarterly Report to enter the Quarterly Report Form.
- e. Fill out the form completely and then click “Save”. After clicking save, to return to the “Change the Status” menu click the “Document Information link.

 [SAVE](#)

 [Back](#)

Document Information: [Qtr1-2013-MADHCD EOH-00064](#) 

Parent Information: [MWIP-2013-MADHCD E-00028](#)

 [Details](#)

You are here: > [MassWorks Quarterly Report Menu](#) > [Forms Menu](#)

MASSWORKS INFRASTRUCTURE PROGRAM QUARTERLY REPORT

Name of Public Entity: MADHCD EOH Testing Org

Please note quarter being reported:

Fiscal Year: 2013

Does this project support a small town assistance program?

- f. After entering the “Change the Status” menu, click on Quarterly Report Submitted and your report will be submitted to your Project Manager.

- g. To see progress reports which have already been submitted click on the fourth tab across the grant homepage labelled “Progress Reports”, enter the desired criteria, and then click “Search”. After clicking “Search” the progress reports will populate below.

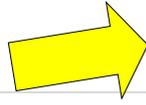
Possible Statuses

QUARTERLY REPORT CANCELLED

[APPLY STATUS](#)

QUARTERLY REPORT SUBMITTED

[APPLY STATUS](#)



[Back](#)

Progress Reports

Use the search functionality below to find a specific Progress Report.

Search Progress Reports

Progress Report Types

Progress Report Name

Person

Status

Year

Export Results to **Sort by:**

Number of Results **3**

Document Type	Organization	Name	Current Status	Year
MassWorks Quarterly Report	MADHCD EOH Testing Org	PR-2013-MADHCD EOH-00050	Quarterly Report Submitted	2013
MassWorks Quarterly Report	MADHCD EOH Testing Org	PR-2013-MADHCD EOH-00055	Quarterly Report Submitted	2013
MassWorks Quarterly Report	MADHCD EOH Testing Org	Qtr1-2013-MADHCD EOH-00060	Quarterly Report Submitted	2013

1

6. Additional Information

The MassWorks Program reserves the right to request additional information about the public infrastructure project or associated private development project at any time. It is the responsibility of the Grant Recipient to maintain all relevant details about the details the project.

Monthly Project Manager Calls

MassWorks Grant Recipients will be expected to participate in monthly update calls with their assigned Project Manager. The date and time of these calls should be chosen by the Grant Recipient at a convenient time. Communities are encouraged to include their contractor, consultant and private development partners in these calls to ensure all parties involved in the project are kept informed of all MassWorks related updates. Project Managers may request more frequent calls for complex projects or those experiencing delays or other challenges.

Events and Press

EOHED Project Managers will be glad to partner with Grant Recipients that wish to highlight their work at an event or in a press release. Grant Recipients should notify their assigned Project Manager of this interest. Please see the attached Event Request Form (Attachment F) as a recommended template for these requests.

MassWorks Contact Information

- Victoria Maguire, State Permit Ombudsman/Director
Email: Victoria.Maguire@state.ma.us Phone: 617-788-3649
- Erica Kreuter, Senior Project Manager
Email: Erica.Kreuter@state.ma.us Phone: 617-788-3631
- Stephen O'Neil, Finance Director
Email: Stephen.ONEil@state.ma.us Phone: 617-788-3653
- For general inquiries: MassWorks@state.ma.us

Mailing Address

MassWorks Infrastructure Program
Executive Office of Housing and Economic Development
One Ashburton Place, Suite 2101
Boston, Massachusetts 02108

*If you have any questions, please contact the MassWorks Office at 617-788-3649
or email us at MassWorks@state.ma.us*